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EXAMINER
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TRAN, QUOC A

ART UNIT	PAPER NUMBER
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2176

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12/30/2009

PAPER

**Please find below and/or attached an Office communication concerning this application or proceeding.**

The time period for reply, if any, is set in the attached communication.

<b>Office Action Summary</b>	<b>Application No.</b> 10/692,525	<b>Applicant(s)</b> TANGEN ET AL.	
	<b>Examiner</b> Quoc A. Tran	<b>Art Unit</b> 2176	

**-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address --**

**Period for Reply**

A SHORTENED STATUTORY PERIOD FOR REPLY IS SET TO EXPIRE 3 MONTH(S) OR THIRTY (30) DAYS, WHICHEVER IS LONGER, FROM THE MAILING DATE OF THIS COMMUNICATION.

- Extensions of time may be available under the provisions of 37 CFR 1.136(a). In no event, however, may a reply be timely filed after SIX (6) MONTHS from the mailing date of this communication.
- If NO period for reply is specified above, the maximum statutory period will apply and will expire SIX (6) MONTHS from the mailing date of this communication.
- Failure to reply within the set or extended period for reply will, by statute, cause the application to become ABANDONED (35 U.S.C. § 133).

Any reply received by the Office later than three months after the mailing date of this communication, even if timely filed, may reduce any earned patent term adjustment. See 37 CFR 1.704(b).

**Status**

1) ☒ Responsive to communication(s) filed on 23 November 2009.

2a) ☐ This action is **FINAL**.                      2b) ☒ This action is non-final.

3) ☐ Since this application is in condition for allowance except for formal matters, prosecution as to the merits is closed in accordance with the practice under *Ex parte Quayle*, 1935 C.D. 11, 453 O.G. 213.

**Disposition of Claims**

4) ☒ Claim(s) 1, 4, 6-18, 22-23, 26, and 28-42 is/are pending in the application.

4a) Of the above claim(s) \_\_\_\_\_ is/are withdrawn from consideration.

5) ☐ Claim(s) \_\_\_\_\_ is/are allowed.

6) ☒ Claim(s) 1, 4, 6-18, 22, 23, 26 and 28-42 is/are rejected.

7) ☐ Claim(s) \_\_\_\_\_ is/are objected to.

8) ☐ Claim(s) \_\_\_\_\_ are subject to restriction and/or election requirement.

**Application Papers**

9) ☐ The specification is objected to by the Examiner.

10) ☒ The drawing(s) filed on 23 November 2009 is/are: a) ☒ accepted or b) ☐ objected to by the Examiner.

Applicant may not request that any objection to the drawing(s) be held in abeyance. See 37 CFR 1.85(a).  
Replacement drawing sheet(s) including the correction is required if the drawing(s) is objected to. See 37 CFR 1.121(d).

11) ☐ The oath or declaration is objected to by the Examiner. Note the attached Office Action or form PTO-152.

**Priority under 35 U.S.C. § 119**

12) ☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).

a) ☐ All    b) ☐ Some \*    c) ☐ None of:

1. ☐ Certified copies of the priority documents have been received.
2. ☐ Certified copies of the priority documents have been received in Application No. \_\_\_\_\_.
3. ☐ Copies of the certified copies of the priority documents have been received in this National Stage application from the International Bureau (PCT Rule 17.2(a)).

\* See the attached detailed Office action for a list of the certified copies not received.

**Attachment(s)**

1) ☒ Notice of References Cited (PTO-892)

2) ☐ Notice of Draftsperson's Patent Drawing Review (PTO-948)

3) ☐ Information Disclosure Statement(s) (PTO/SB/08)  
Paper No(s)/Mail Date \_\_\_\_\_.

4) ☐ Interview Summary (PTO-413)  
Paper No(s)/Mail Date \_\_\_\_\_.

5) ☐ Notice of Informal Patent Application

6) ☐ Other: \_\_\_\_\_.

### **DETAILED ACTION**

This action is a Non-Final Office Action, in response to Applicant's RCE/Amendments/Remarks filed 11/23/2009. Effective filing date is **10/24/2003** (Hyperion Solutions Corporation).

- Claims 1, 4, 6-18, 22-23, 26, and 28-42 are pending.
- Claims 1, 18, and 23 are independence claims.
- Applicants have amended claims 1, 4, 6-9, 18, 23, and 28-31.
- Claims 2-3, 5, 19-21, 24-25 and 27 are canceled.

Objection to the specification set forth in the previous office action dated 06/23/2009 is hereby withdrawn due to applicant amendment to claims 18 and 23 of the current paper.

Rejection under 35 U.S.C. 112 First and Second to claims 1, 3-18, 20-23, 25-42 set forth in the previous office action dated 06/23/2009 is hereby withdrawn due to applicant amendment of the current paper.

### ***Continued Examination Under 37 CFR 1.114***

A request for continued examination under 37 CFR 1.114, including the fee set forth in 37 CFR 1.17(e), was filed in this application after final rejection. Since this application is eligible for continued examination under 37 CFR 1.114, and the fee set forth in 37 CFR 1.17(e) has been timely paid, the finality of the previous Office action has been withdrawn pursuant to 37 CFR 1.114. Applicant's submission filed on 11/23/2009 has been entered.

***Claim Rejections - 35 USC § 103***

The following is a quotation of 35 U.S.C. 103(a) which forms the basis for all obviousness rejections set forth in this Office action:

*(a) A patent may not be obtained though the invention is not identically disclosed or described as set forth in section 102 of this title, if the differences between the subject matter sought to be patented and the prior art are such that the subject matter as a whole would have been obvious at the time the invention was made to a person having ordinary skill in the art to which said subject matter pertains. Patentability shall not be negatived by the manner in which the invention was made.*

**Claims 1, 4, 6-18, 22-23, 26, and 28-42** rejected under 35 U.S.C. 103(a) as being unpatentable over Davis et al (US 20030041077A1, filed 01/23/2002) [hereinafter "Davis"], in view of Block et al (US 20050182777A1- Continuation of 10/086,522, filed 03/04/2002) [hereinafter "Block"],

*Regarding independent claim 1,*

Davis teaches:

**A method for establishing a mapping between internal metadata for a database and external metadata,**

(At Fig. 2-3 and at Page 5 Para [0061-0067] → Davis discloses this limitation, as clearly indicated in the cited text, [e.g. the internal XBRL data [e.g., Internal metadata, because XBRL is an XML-based language [XML is metadata] ] used for reporting financials such as balance sheets, cash flow reports etc [discloses @ Para 23.] and report items 222-224 mapped by RDX mapper item 210 to a web server database storage included XBRL documents item 340 [e.g. external metadata] in a computer network item 314.

The above interpretation is supported the instant specification at Page 2 Para [0003] through Page 3 Para [0004, the last two sentences, which is stated "*XBRL is based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be valuable to allow users to map internal metadata to XBRL external metadata*", it is reasonable to find that the term, "a mapping between internal metadata for a database and external metadata" is equivalent to the XBRL of Davis.)

**the method comprising: reading the internal metadata from the database, the internal metadata including metadata that describes data stored in the database;**

(At Fig. 2 and at Page 5 Para [0061-0067] → Davis disclosed this limitation, as clearly indicated in the cited text, [e.g., the internal XBRL data [e.g., Internal metadata] and report items 222-224 mapped by RDX mapper item 210 to the a web server database storage included XBRL documents item 340 [e.g. external metadata] in a computer network item 31.)

**generating and displaying a screen, the screen including a grid having rows and columns, the rows and columns having dimensional metadata from the internal metadata placed in the grid as row and/or**

**column headings, the grid further including the internal metadata read from the database.**

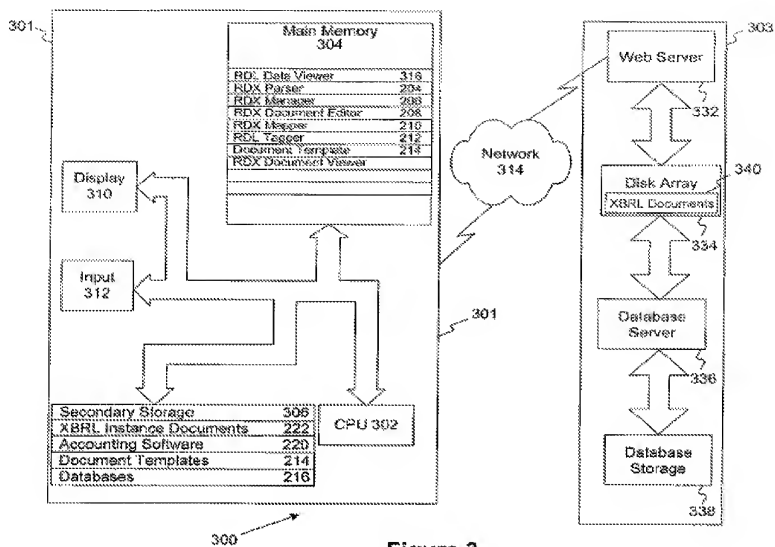
(At figure 2 and at page 6 paragraph [0066] and page 10 paragraph [00110] → Davis disclosed this limitation, as clearly indicated in the cited text, [e.g., XBRL instance documents elements are displayed [0066]. Also RDX mapper 210 supports pointers reference information in a spreadsheet, or other XBRL documents [0010].] It is reasonable to interpreted the spreadsheet includes rows/column and having dimensional.)

**receiving from a user a selection of a portion of the grid, the selection indicating the internal metadata to be mapped to the external metadata; creating a mapping between the internal metadata of the selected portion of the grid and the external metadata based on the user selections.**

(@ Para [65-67] → Davis discloses the RDL system, in turn, provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets, etc.), and a general user interface for RDL documents. In addition the RDL system includes the RDX mapper 210 creates and links the NDOMs to form a software representation of an XBRL document that will be used to build the actual XBRL instance documents 222 and XBRL reports 224. RDX mapper 210 is a translation mechanism for acquiring data from an accounting system (e.g., an accounting database or files) and placing the data in the appropriate location within XBRL report 224, as instructed by one or more

document templates 214. Once RDX mapper 210 has processed document templates 214, which defines the data for XBRL report 224, RDX mapper 210 may be instructed to immediately execute or to schedule execution of XBRL report 224 at a later time. In the first case, a report reflecting the information immediately available is produced. In the second, the report will contain information available at the time of its scheduled execution.

As shown in figure 3 and Para 73 of Davis→ the XBRL document item **334 is external data** while the RDX Mapper, RDX document viewer item 316, 210 and the second storage **XBRL instance document is resided internally**. Thus reasonably, the Examiner concludes that creating a mapping between the internal metadata of the selected portion of the grid and the external metadata based on the user selections is described in Davis.)



**Figure 3**

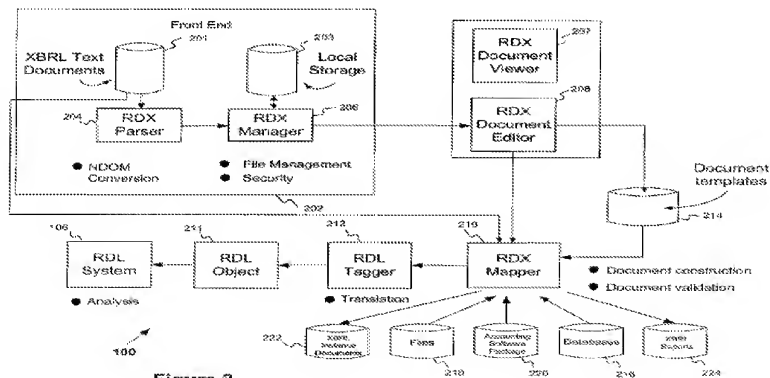


Figure 2



In addition, Davis does not expressly teach, but Block teaches:

**in response to receiving the user selection: determining if the external metadata describing all data points within said selection is predefined, and if so, receiving from said user a definition of external metadata comprising: presenting said user a list from which they may select an item of predefined metadata; and receiving from said user a selection of an item of predefined metadata from said list; and**

(At the Abstract and @ Para [32]→ Block disclosed a method for adding labels to XML compliant or XBRL compliant, includes:

- identifying data in an electronically represented file,
- selecting labels that correspond to ***metadata in the identified data***, based on ***a list*** associating labels with metadata, and
- adding the selected labels into the electronically represented file to label the metadata and/or elements in the identified data associated with the metadata.

The labels include information about the data and are defined in one or more taxonomies. In "metadata" or "meta information" is data about data, or information that describes other information. In this example the metadata in the identified data identifies or describes other data elements within the identified data, and can include for example text strings, various control characters (e.g., various ASCII control characters), and so forth For example, metadata in the captured data stream or ***file can be used to identify the data to which the metadata refer***, [predefined metadata] and then

additional metadata referring to the identified data can be added to the captured data stream or file. For example, the list can contain labels from multiple taxonomies, standards, and so forth, including words from languages, link synonymous or related labels. When a label from a first taxonomy, etc. In addition @ Para 14, Block further discloses the identified data are mapped to an **XBRL** (extensible Business Reporting Language) taxonomy, **a spreadsheet**, a database, or a flat file. Also Block further disclose report generating method; utilized user interface and internal; and external metadata- [ @ Para 40, where a determination is made whether an un-identified text string, or a text string that does not have an associated label on the list, has been encountered. If yes, then control proceeds to step 108, where the user is prompted to select a label that corresponds to the text string. For Example, the user can be provided with one or more taxonomies in a pop-up window or as part of the dialog, so that the correct label can be quickly and easily selected. Also metadata and add corresponding metadata, can be stored as a data file separately from the program or module(s), and can be stored or accessed remotely, for example via an Internet web server [ @ Para 35].)

**determining if a syntax of the external metadata describing all data points within said selection is predefined and the external metadata for said selection is not predefined, and if so, receiving from said user a definition of external metadata comprising: presenting said user with one or more dialog boxes in which they can specify external metadata to be**

**created; and receiving from said user a specification of external metadata to be created;**

(At Para [39]→ Block discloses data in an electronically represented file is identified. and selected that correspond to metadata such as text strings in the identified data, based on a list that associates labels with text strings. Also Block discloses a determination step to determine whether an un-identified text string, or a text string that does not have an associated label on the list, has been encountered. If yes, then control proceeds to step 108, where the user is prompted to select a label that corresponds to the text string. For Example, the user can be provided with one or more taxonomies in a pop-up window or as part of the dialog, so that the correct label can be quickly and easily selected [ @ Para 39-41]. Also metadata and add corresponding metadata, can be stored as a data file separately from the program or module(s), and can be stored or accessed remotely, for example via an Internet web server [ @ Para 35].)

Accordingly, it would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis' XBRL report generating method to include a means of said in response to receiving the user selection: determining if the external metadata describing all data points within said selection is predefined, and if so, receiving from said user a definition of external metadata comprising: presenting said user a list from which they may select an item of predefined metadata; and receiving from said user a selection of an item of predefined metadata from said list; and determining if a syntax of the external metadata describing all data points within said

selection is predefined and the external metadata for said selection is not predefined, and if so, receiving from said user a definition of external metadata comprising: presenting said user with one or more dialog boxes in which they can specify external metadata to be created; and receiving from said user a specification of external metadata to be created as taught by Block. One of ordinary skill in the art would have been motivated to modify this combination because Davis and Block are both directed to a method and system of generating, displaying, analyzing and controlling XBRL report. This combination provides a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document utilizing internal/external metadata of XBRL- See Davis at Para 24.

*Regarding independent claim 18,*

is directed to an apparatus for performing the steps of claim 1 cites above. Thus, Davis and Block disclose every limitation of Claim 18 and provides proper reasons to combine, as indicated in the above rejections for Claim 1- see Davis at Para 68, discloses various System Hardware Components. Also Davis further discloses:

**an internal metadata grid organizer**, see Davis at figure 2 item 210, a RDX mapper]. Also RDX mapper 210 supports pointers reference information in

a spreadsheet, or other XBRL documents [XBRL is an XML-based language used for reporting financials such as balance sheets, cash flow reports [XML is metadata language]-[@ Para 23 and Para 10].]

In addition, Block further teaches:

**a predefined external metadata selection determiner, wherein said external metadata selection determiner determines if all external metadata of the user selection is predefined, and if so presents a user definition receiver including: a predefined metadata list presenter;**

(At the Abstract and @ Para [32]→ Block disclosed a method for adding labels to XML compliant or XBRL compliant, includes:

- identifying data in an electronically represented file,
- selecting labels that correspond to ***metadata in the identified data***, based on ***a list*** associating labels with metadata, and
- adding the selected labels into the electronically represented file to label the metadata and/or elements in the identified data associated with the metadata.

The labels include information about the data and are defined in one or more taxonomies. In "metadata" or "meta information" is data about data, or information that describes other information. In this example the metadata in the identified data identifies or describes other data elements within the identified data, and can include for example text strings, various control characters (e.g., various ASCII control characters), and so forth For example, metadata in the captured data stream or ***file can be used to***

**identify the data to which the metadata refer, [predefined metadata]** and then additional metadata referring to the identified data can be added to the captured data stream or file. For example, the list can contain labels from multiple taxonomies, standards, and so forth, including words from languages, link synonymous or related labels. When a label from a first taxonomy, etc. In addition @ Para 14, Block further discloses the identified data are mapped to an **XBRL** (extensible Business Reporting Language) taxonomy, **a spreadsheet**, a database, or a flat file. Also Block further disclose report generating method; utilized user interface and internal; and external metadata- [@ Para 40, where a determination is made whether an un-identified text string, or a text string that does not have an associated label on the list, has been encountered. If yes, then control proceeds to step 108, where the user is prompted to select a label that corresponds to the text string. For Example, the user can be provided with one or more taxonomies in a pop-up window or as part of the dialog, so that the correct label can be quickly and easily selected. Also metadata and add corresponding metadata, can be stored as a data file separately from the program or module(s), and can be stored or accessed remotely, for example via an Internet web server [@ Para 35].)

**a predefined metadata list item receiver coupled to said predefined metadata list presenter; and an external metadata syntax determiner wherein said external metadata syntax determiner determines if a syntax for all external metadata of the user selection is predefined, and if so, presents a user definition receiver including: an external metadata dialog~**

**box presenter; and an external metadata specification receiver coupled to said external metadata dialog box presenter;**

(At Para [39]→ Block discloses data in an electronically represented file is identified, and selected that correspond to metadata such as text strings in the identified data, based on a list that associates labels with text strings. Also Block discloses a determination step to determine whether an un-identified text string, or a text string that does not have an associated label on the list, has been encountered. If yes, then control proceeds to step 108, where the user is prompted to select a label that corresponds to the text string. For Example, the user can be provided with one or more taxonomies in a pop-up window or as part of the dialog, so that the correct label can be quickly and easily selected [@@ Para 39-41]. Also metadata and add corresponding metadata, can be stored as a data file separately from the program or module(s), and can be stored or accessed remotely, for example via an Internet web server [@@ Para 35].)

Accordingly, it would have been obvious to one of ordinary skill in the art at the time of the invention to modify Davis' XBRL report generating method to include a means of said a predefined external metadata selection determiner, wherein said external metadata selection determiner determines if all external metadata of the user selection is predefined, and if so presents a user definition receiver including: a predefined metadata list presenter; and a predefined metadata list item receiver coupled to said predefined metadata list presenter; and an external metadata syntax determiner wherein said external metadata syntax determiner determines if a syntax for all external

metadata of the user selection is predefined, and if so, presents a user definition receiver including: an external metadata dialog box presenter; and an external metadata specification receiver coupled to said external metadata dialog box presenter as taught by Block. One of ordinary skill in the art would have been motivated to modify this combination because Davis and Block are both directed to a method and system of generating, displaying, analyzing and controlling XBRL report. This combination provides a predictable result of advantageously provides a finer level of detail that enables the user to enable reports to be automatically scheduled and transmitted in XBRL format, and capable of automatically link a current accounting system to an XBRL document to generate an XBRL report; that have an efficient and automatic means to analyze and manipulate data in an XBRL document utilizing internal/external metadata of XBRL- See Davis at Para 24.

*Regarding **independent claim 23**,*

is directed to an apparatus for performing the steps of claim 1 cites above. Thus, Davis and Block disclose every limitation of Claim 23 and provides proper reasons to combine, as indicated in the above rejections for Claim 1- see Davis at Para 68, discloses various System Hardware Components.

*Regarding **claims 4 and 26**,*

Davis and Block teach the method of claims 1 and 23 and further comprise:

**wherein said list is provided in a tree control.**



(See Davis at Para 62, discloses a NDOM form a tree structure.)

*Regarding **claims 6-7 and 28-29,***

are fully incorporated similar subject of claim 18 cites above, and are similarly rejected along the same rationale. Thus, Davis and Block disclose every limitation of Claims 6-7 and 28-29 and provide proper reasons to combine, as indicated in the above rejections for Claim 18.

In addition, Davis teaches:

**wherein said presenting includes presenting said user with a dialog box.**

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906. )

*Regarding **claims 8 and 30,***

are fully incorporated similar subject of claim 18 cites above, and are similarly rejected along the same rationale. Thus, Davis and Block disclose every limitation of Claims 8 and 30 and provide proper reasons to combine, as indicated in the above rejections for Claim 18.

In addition, Davis teaches:

**wherein said presenting includes presenting said user with a dialog box.**

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906. )

*Regarding **claims 9 and 31,***

are fully incorporated similar subject of claim 18 cites above, and are similarly rejected along the same rationale. Thus, Davis and Block disclose every limitation of Claims 9 and 31 and provide proper reasons to combine, as indicated in the above rejections for Claim 18.

In addition Davis teaches:

**wherein said presenting includes presenting said user with a dialog box.**

(See Davis at fig. 9 and Para 104, discloses, "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906. )

*Regarding **claims 10 and 32,***

Davis and Block teach the method of claims 1 and 23 and further comprise:

**wherein a control for said dialog box is a tree control when an element button is selected and a text field when a custom button is selected.**

(See Davis at Para 62, discloses a NDOM form a tree structure. Also Davis further discloses the "Tree View for Reusable Data Markup Language" which was previously incorporated by reference. Information about the selected taxonomy element is displayed as a pop up window, such as document window 906 [ @ Para 104 and Illustrated in Fig 9].)

*Regarding **claims 11 and 33,***

Davis and Block teach the method of claims 1 and 23 and further comprise:

**wherein said selection is one or more columns in said grid.**

(At Fig. 2 item 207 and at Para [0067] → Davis disclosed this limitation, as clearly indicated in the cited text [e.g., The RDL system, in turn, provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets [rows and column], etc.), and a general user interface for RDL documents.]

*Regarding **claims 12 and 34,***

Davis and Block teach the method of claims 1 and 23 and further comprise:

**wherein said selection is one or more columns in said grid.**

(At Fig. 2 item 207 and at Para [0067] → Davis disclosed this limitation, as clearly indicated in the cited text [e.g., The RDL system, in turn, provides data browsing, data

manipulation, data viewing (for example, in the form of charts, spreadsheets [rows and column], etc.), and a general user interface for RDL documents.)

*Regarding **claims 13 and 35,***

Davis and Block teach the method of claims 1 and 23 and further comprise:

**wherein said selection is one or more individual cells in said grid,  
wherein said one or more individual cells do not comprise an entire row or  
an entire column.**

(At Para [0116]→ Davis disclosed this limitation, as clearly indicated in the cited text [e XBRL's period type [e.g. dimensional metadata, report with four, three-month time periods (four quarters) [cell].)

*Regarding **claims 14 and 36,***

Davis and Block teach the method of claims 13 and 35 and further comprise:

**wherein preexisting mappings for rows or columns containing said  
selection are overwritten for said selected individual cells.**

(At Fig. 2 and at Para [0096] → Davis disclosed this limitation, that is RDX document editor 208 provides style sheet editing capabilities, for example, contain a set of financial statements against which several style sheets could be applied: one to show the data in annual columns, one to show it in a quarterly breakdown. Also Davis further disclosed XBRL's period type [e.g. dimensional metadata, report with four, three-month

time periods (four quarters). The user may also use these parameters to specify any duration for a period type], See Davis at Para [0116].)

*Regarding **claims 15 and 37**,*

Davis and Block teach the method of claims 1 and 23 and further comprise:

**receiving from said user a formula involving one or more data items in said grid; creating a new row or column in said grid; entering said formula into a cell in said new row or column; and wherein said selection includes said cell.**

(At Fig. 2 and at Para [0096] → Davis disclosed this limitation, that is RDX document editor 208 provides style sheet editing capabilities, for example, contain a set of financial statements against which several style sheets could be applied: one to show the data in annual columns, one to show it in a quarterly breakdown. Also Davis further disclosed XBRL's period type [e.g. dimensional metadata, report with four, three-month time periods (four quarters). The user may also use these parameters to specify any duration for a period type], See Davis at Para [0116].)

*Regarding **claims 16 and 38**,*

Davis and Block teach the method of claims 1 and 23 and further comprise:

**external metadata is Extensible Business Reporting Language (XBRL) metadata;**

(See Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets report.)

*Regarding **claims 17 and 39,***

are fully incorporated similar subject of claim 18 cites above, and are similarly rejected along the same rationale. Thus, Davis and Wason disclose every limitation of Claims 17 and 39 and provide proper reasons to combine, as indicated in the above rejections for Claim 18.

In addition, Davis teaches:

. **schema manager-** (See Davis at Para 82, discloses XBRL Schema management.)

*Regarding **Claim 22,***

Davis and Block teach the method of claim 18 and further comprise:

**a user formula receiver; a new row or column creator coupled to said user formula receiver and to said internal metadata grid organizer; a new row or column user formula placer coupled to said new row or column creator and to said user formula receiver.**

(See Davis at Para 23, discloses XBRL is an XML-based language used for reporting financials such as balance sheets report. Also Davis further disclosed the RDX document editor 208 provides style sheet editing capabilities, for example, contain a set of financial statements against which several style sheets could be applied: one to show

the data in annual columns, one to show it in a quarterly breakdown. Also Davis further disclosed XBRL's period type [e.g. dimensional metadata, report with four, three-month time periods (four quarters). The user may also use these parameters to specify any duration for a period type], See Davis at Para [0116].)

*Regarding **Claims 40-42**,*

Davis and Block teach the method of claims 1, 18 and 23 and further comprise:

**the internal metadata describes data, contained in the database,  
from which a report is to be generated; and the screen includes tools for  
designing the report.**

(At Fig. 2 item 207 and at Page 5 Para [0061-0067] → Davis disclosed this limitation, as clearly indicated in the cited text [e.g., the RDX document viewer, which was read from local storage item 203 of Fig. 2 as shown]. Also Davis further disclosed the RDL supports translation of XBRL instance document data into RDL format for analysis in RDL system 106. The RDL system, in turn, provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets [rows and column], etc.), and a general user interface for RDL documents, See Davis at Para [0067].)

It is noted that any citations to specific, pages, columns, lines, or figures in the prior art references and any interpretation of the references should not be considered to be limiting in any way. A reference is relevant for all it contains and may be relied upon

for all that it would have reasonably suggested to one having ordinary skill in the art.  
See, MPEP 2123.

### ***Response to Arguments***

Applicant's arguments filed 11/23/2009 have been considered but are moot in view of the new ground(s) of rejection, which cited above (see the remarks pages 13-17).

It is noted; Applicant's amendments necessitated the new ground(s) of rejection presented in this Office action. Also this is a NonFinal office action in order to provide applicant the opportunity to response to the new grounds of rejection, which is set forth above (see above for details).

Further, the examiner introduces **Block** [new reference] (see above for details). In addition, it is noted the Examiner maintains the **Davis** reference; since Davis discloses the mapper for generating a relationship between data from one or more sources and the one or more values to be placed within the report (Para 27) which represented in a "Tree View for Reusable Data Markup Language" (Fig. 9 and Para 104) wherein RDL system 106, which provides the analytical processing capability of the system. RDX program elements 102 convert XBRL information into RDL data objects for analysis by RDL system 106. Conduit 104 is a mechanism whereby RDL data objects are passed to the RDL system 106. Conduit 104 may include any communications mechanism (e.g., an internal memory copy, a TCP/IP transfer across



the Internet, or a fetch from a storage device such as a hard disk) (Para 59). Davis further discloses XBRL is an XML-based language used for reporting financials such as balance sheets, cash flow reports. XML is also known as metadata. This interpretation is supported by the Applicant's Specification, which states. "XBRL is based on the Extensible Markup Language (XML), and is specifically designed for allow for improved identification and communication of the complex financial information common in corporate business reports. With the rise of XBRL, it would be valuable to allow users to map internal metadata to XBRL external metadata." See Applicant's Specs at Para 23 and Para 4). Also Davis discloses in FIG. 2, RDX front end 202 (including RDX Parser 204 and RDX Manager 206) works with XBRL-formatted data files that are stored locally or over a network or over the Internet, or in any combination of sources (see item 304 of Fig. 3 XBRL document at the server externally from Computer item 301). Generally, to be a valid XBRL document, the tagged file is validated with the XBRL Document Type Definition ("DTD") and RDX system 100 supplements the DTD validation with optional semantic validation based on user-defined rules. Also Davis's method allows RDL tagger 212 supports translation of XBRL instance document data into RDL format for analysis in RDL system 106 and provides data browsing, data manipulation, data viewing (for example, in the form of charts, spreadsheets, etc.), and a general user interface for RDL documents-(See Para 87-90.)

***Conclusion***

Any inquiry concerning this communication or earlier communications from the examiner should be directed to Quoc A. Tran whose telephone number is 571-272-8664. The examiner can normally be reached on 9AM - 5PM EST.

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Doug Hutton can be reached on 571-272-4137. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

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